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# EXPANDING EDI TO ELECTRONIC COMMERCE

A Presentation To  
IBM Canada



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# Expanding EDI to Electronic Commerce

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Torrey Byles  
Manager  
EDI/Electronic Commerce  
Program

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**EDI and Electronic Commerce Program**  
(EDI)

***Expanding EDI to Electronic Commerce***

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# Topics Covered

- Trends
- Industries/Applications
- Competitors
- Futures
- Canadian Focus/Issues
- Raising IBM Canada's Profile

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TB-2

Notes

# EDI User Trends

- More users and industries
- More types of messaging
- Architecture changes
- Small business participation

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Notes

# EDI Vendor Trends

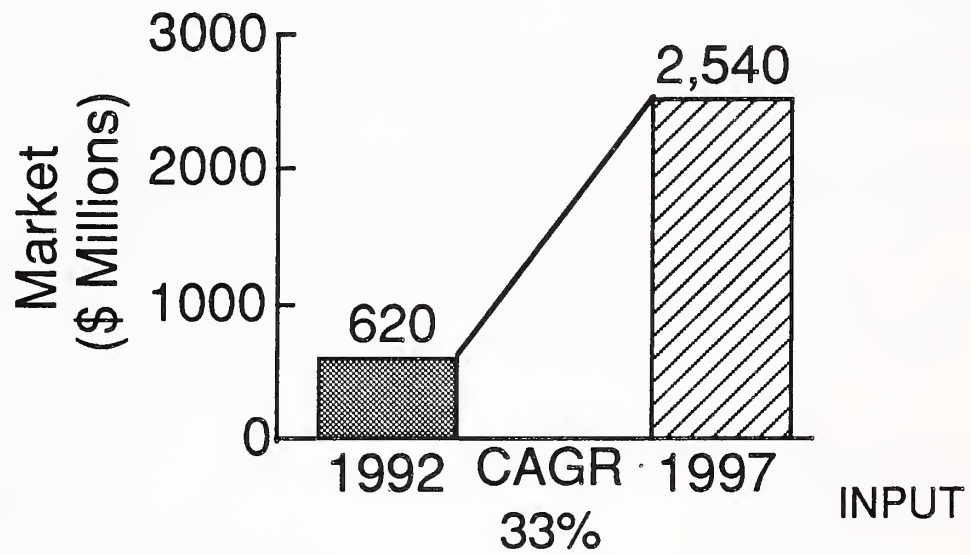
- Move to Electronic Commerce
- Facsimile servers
- Greater software functionality
- Price-performance improvements
- Some consolidation
- Mass marketing

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ED-152

Notes

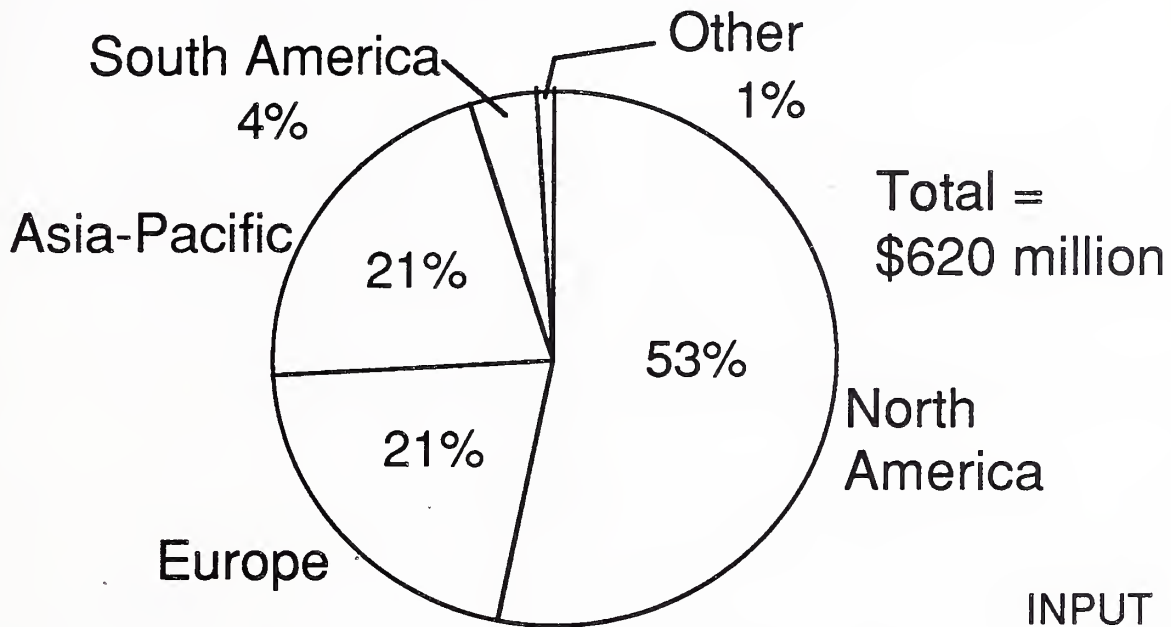
# Worldwide EDI Market 1992-1997



ED-153

## Notes

# 1992 EDI Markets by Region



ED-154

Notes

# Electronic Commerce

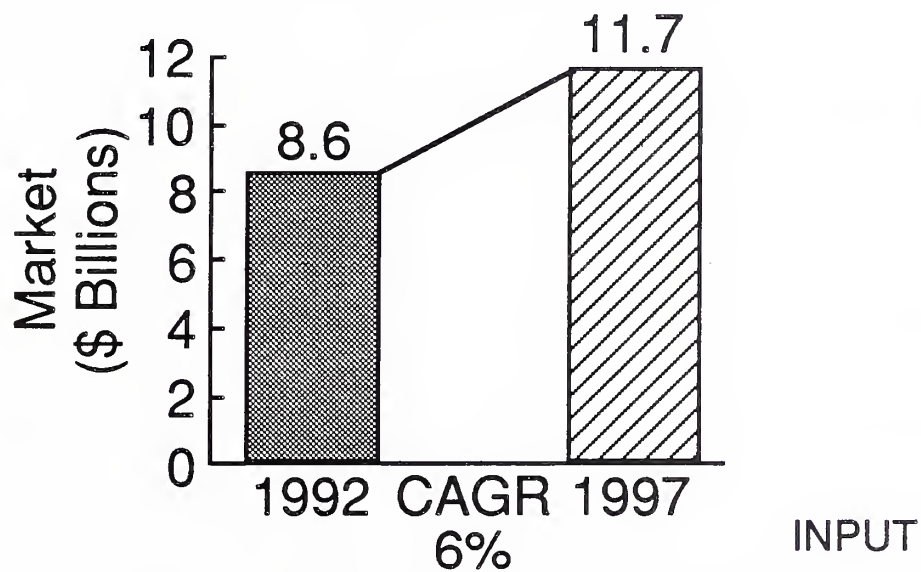
Using electronic information and network systems to support the many kinds of communications in a commercial transaction

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Notes

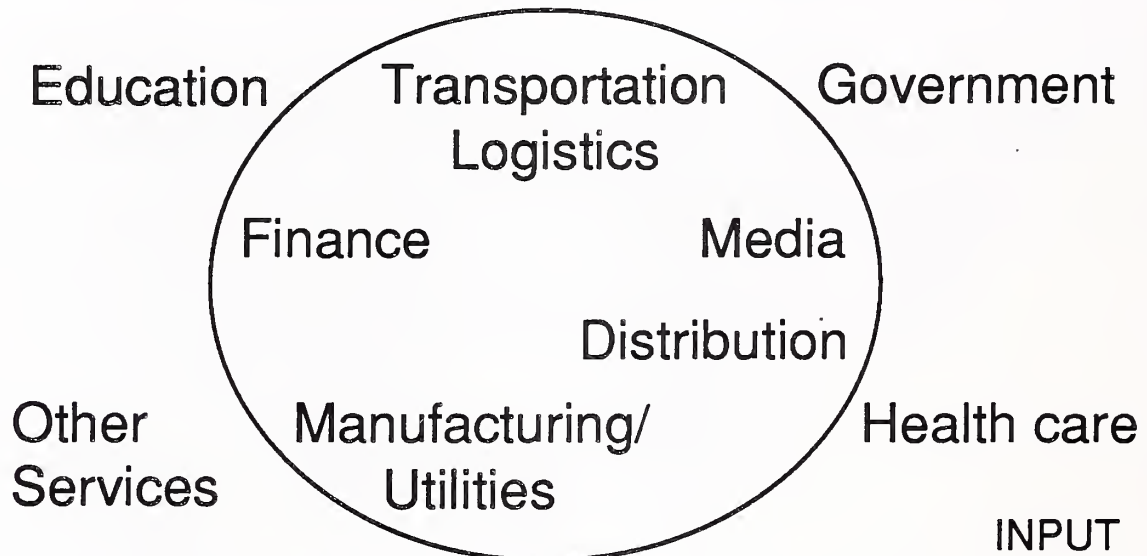
# U.S. EC Software and Service Market



ED-119

## Notes

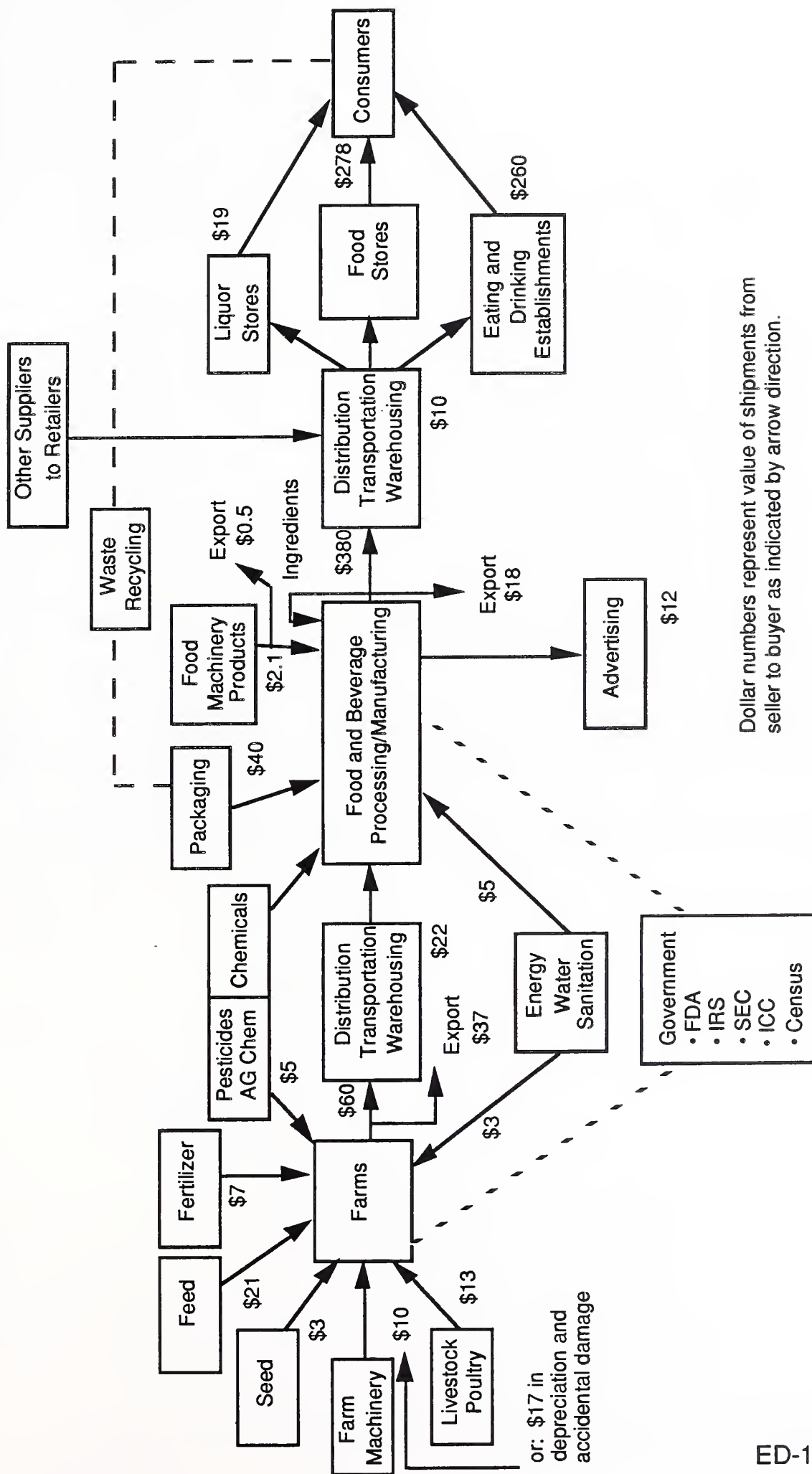
# Core and Specialized EC Trading Communities



ED-121

Notes

# Grocery Trading Community: Players and Trade Flows (Billions)



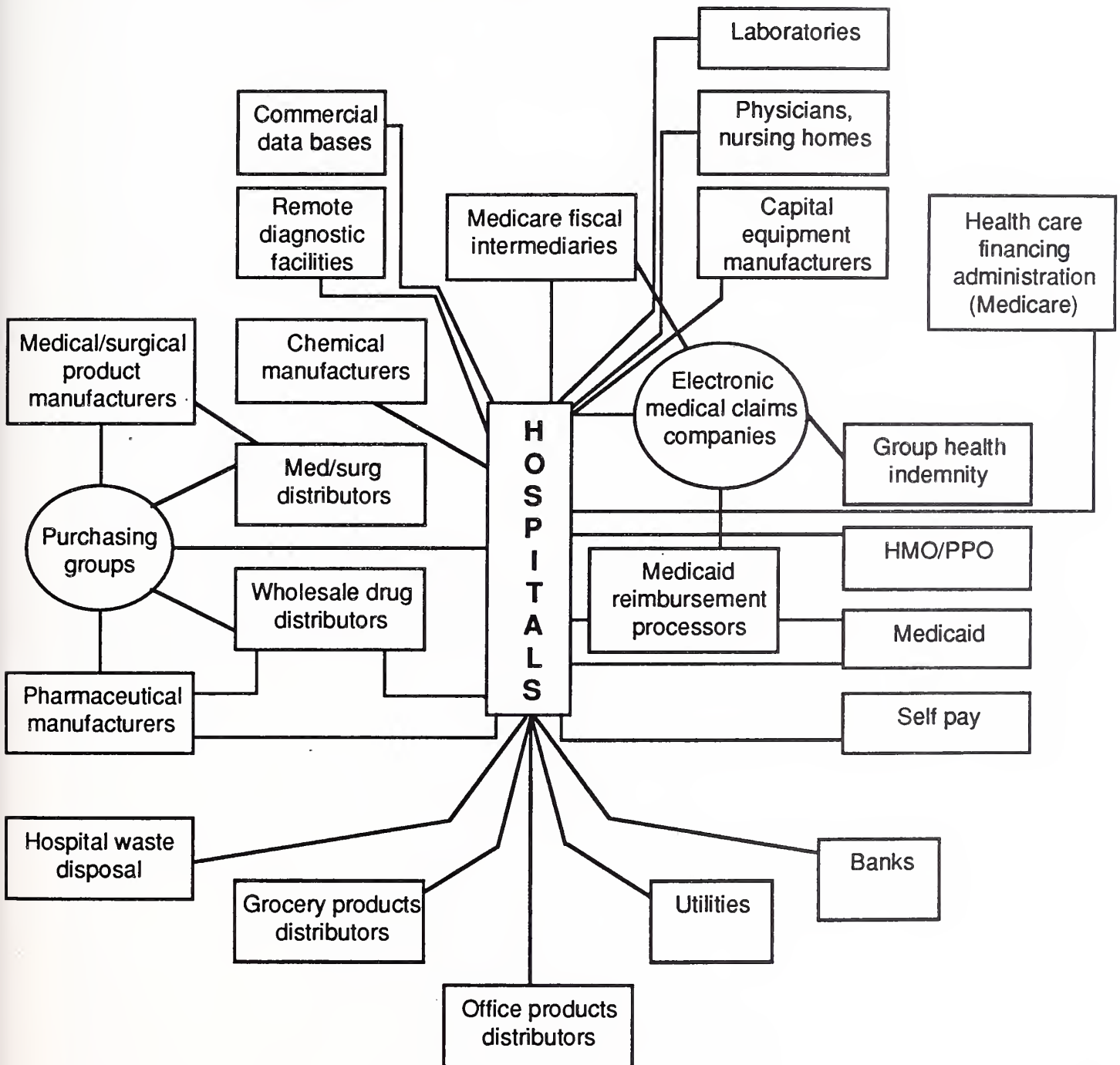
# Grocery EC Services (\$ M)

|     |                      |       |
|-----|----------------------|-------|
| POS | Card processing      | 510   |
|     | Product movement     | 450   |
|     | Check authorization  | 200   |
|     | Electronic marketing | 100   |
|     | Commodity markets    | 300   |
|     | EDI                  | 20    |
|     | Other                | 200   |
|     |                      | INPUT |

ED-123

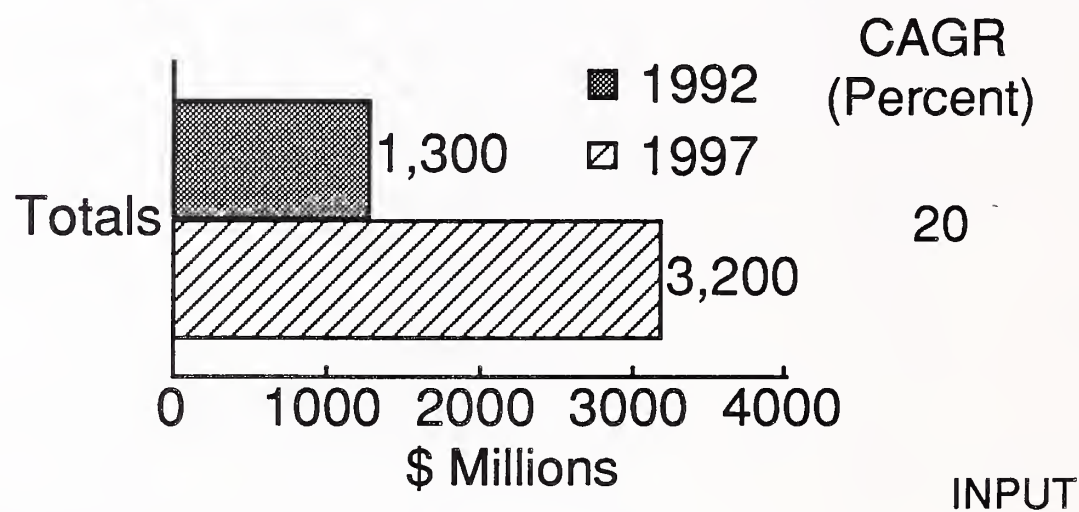
## Notes

## The Health Care Trading Community



ED-156

# Health Care Electronic Commerce Software and Services



ED-157

## Notes

# EC in Transportation and Logistics

- Consumer transactions largest opportunity

|                             | 1992 EC Revenues (\$ M) |
|-----------------------------|-------------------------|
| Freight (incl. warehousing) | 400                     |
| Human (incl. hotel)         | 3,600                   |
| Total                       | 4,000                   |

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Notes

# Electronic Commerce Applications

- EDI
- POS
- EDI/EFT
- E-mail/Groupware
- Enhanced facsimile
- Electronic information services

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Notes

# Electronic Payment Applications

| Payor<br>Payee | Corps.        | People                  | Gov't |
|----------------|---------------|-------------------------|-------|
| Corps.         | 33%           | $\frac{*111\%}{**38\%}$ | 33%   |
| People         | 32%           | N/A                     | 25%   |
| Gov't          | 50% -<br>100% | 32%                     | N/A   |

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## Notes

N/A = not applicable

\* = Home

\*\* = Retail

# Electronic Information Services

- Directories
- Product catalogs
- Market data
- Product information logistics
- On-line versus CD ROM

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Notes

# EC Services

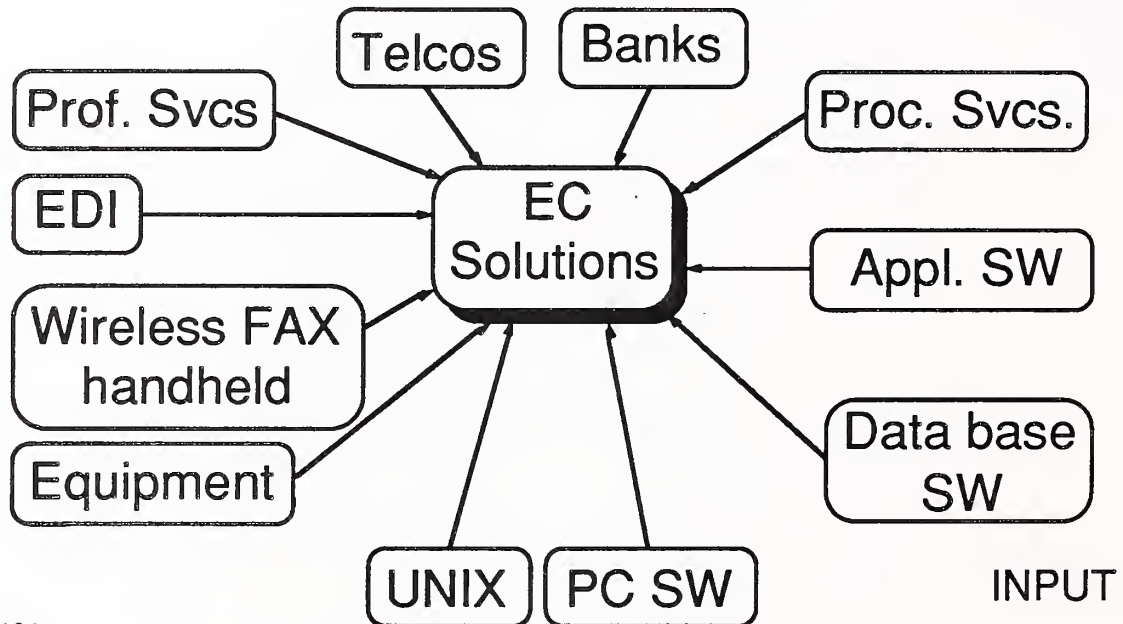
- Professional services
  - Education
  - Systems integration
  - Community facilitation
- Network and processing services
- Outsourcing

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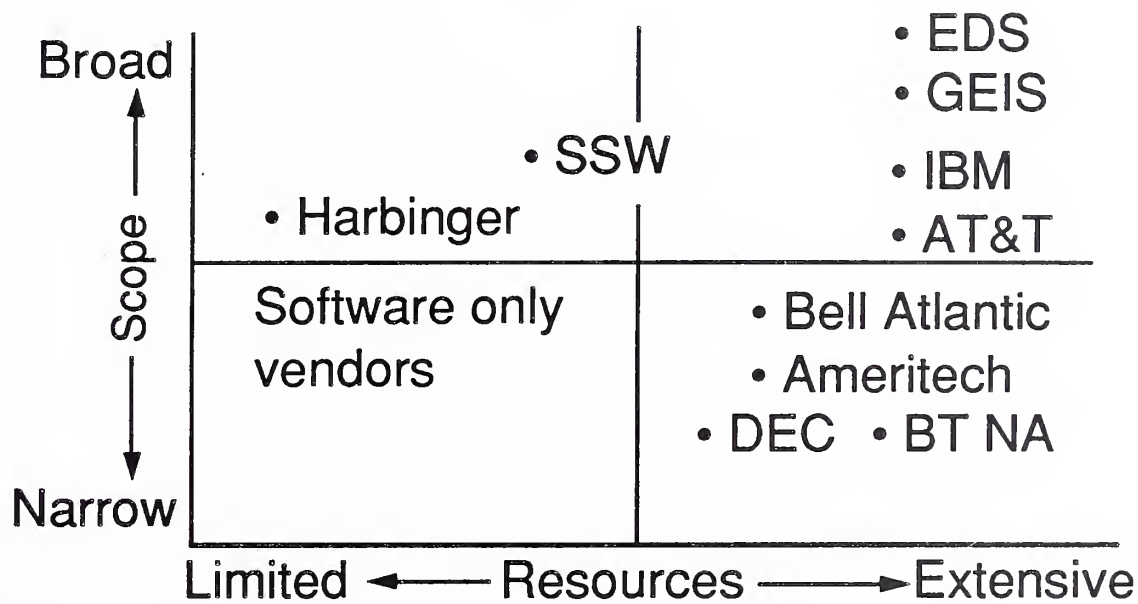
Notes

# Electronic Commerce Vendors



Notes

# EDI Vendors



ED-159

Notes

# 1992 Market Share Leading EDI VANS

Market = \$186M

BT North America

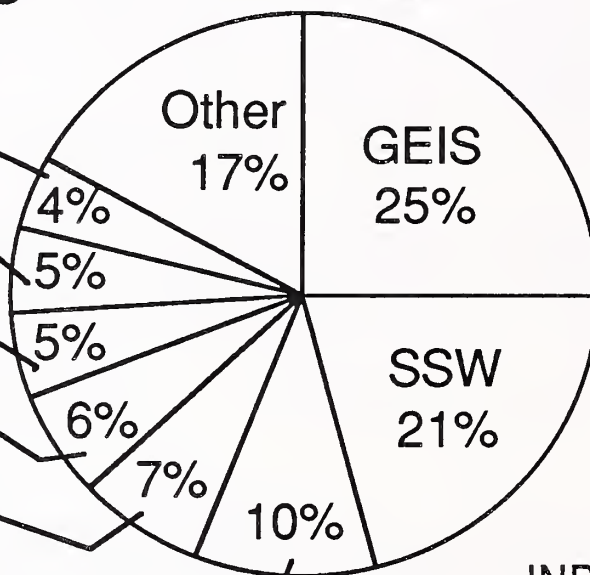
Transnet

Harbinger

Kleinschmidt

RAILINC

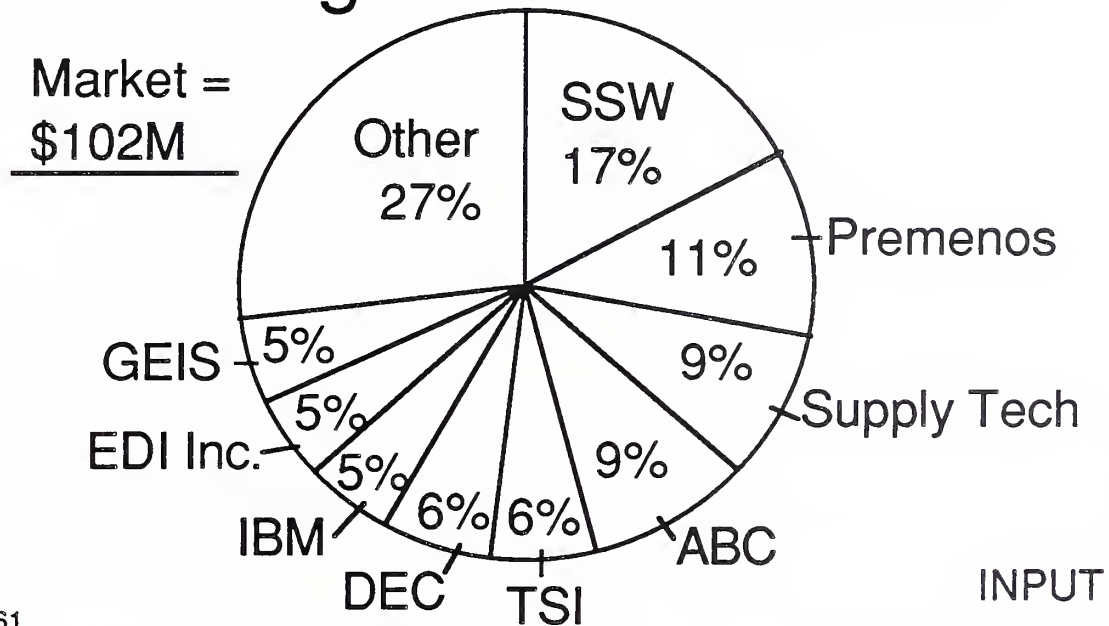
IBM IN



ED-160

Notes

# 1992 Market Share Leading EDI SW Vendors



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## Notes

# EDI Professional Services, 1992

| Vendor                  | 1992 Revenues (\$M) |
|-------------------------|---------------------|
| EDS                     | 5.0                 |
| IBM Information Network | 4.0                 |
| Price Waterhouse        | 2.5                 |
| Andersen Consulting     | 2.0                 |
| Other                   | 13.5                |
| Total                   | 27.0                |

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## Notes

# Futures

- Consolidated industries
- Trading community facilitation
- Mass markets/easy to use
- Facsimile-based messaging
- Electronic information services
- Consumer-corporate linkages

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Notes

# Canadian Issues

- International orientation
- Advanced banking system

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Notes

# IBM Canada's Profile

- Hub-Spoke market development
- Alliances
- Education programs
- NAFTA

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Notes

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*5-year Forecasts, Competitive and Trend Analysis*

- 15 Vertical Markets
- 9 Categories of Software and Services
- 7 Cross-Industry Markets
- The Worldwide Market (30 countries)

### ***U.S. FOCUSED PROGRAMS***

- Outsourcing (vendor and user)
- Downsizing (vendor and user)
- Systems Integration
- EDI and Electronic Commerce
- IT Vendor Analysis
- U.S. Federal Government IT Procurements

### ***EUROPEAN FOCUSED PROGRAMS***

- Outsourcing (vendor and user)
- Downsizing (vendor and user)
- Systems Integration
- Corporate Networks
- Customer Services

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**San Francisco** — 1280 Villa Street  
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Tel. (415) 961-3300 Fax (415) 961-3966

**New York** — 400 Frank W. Burr Blvd.  
Teaneck, NJ 07666

Tel. (201) 801-0050 Fax (201) 801-0441

**Washington, D.C.** — 1953 Gallows Rd., Ste. 560  
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**London** — 17 Hill Street  
London W1X 7FB, England

Tel. +71 493-9335 Fax +71 629-0179

**Paris** — 24, avenue du Recteur Poincaré  
75016 Paris, France

Tel. +1 46 47 65 65 Fax +1 46 47 69 50

**Frankfurt** — Sudetenstrasse 9  
W-6306 Langgöns-Niederkleen, Germany

Tel. + 6447-7229 Fax +6447-7327

**Tokyo** — Saida Building, 4-6  
Kanda Sakuma-cho, Chiyoda-ku  
Tokyo 101, Japan

Tel. +3 3864-0531 Fax +3 3864-4114